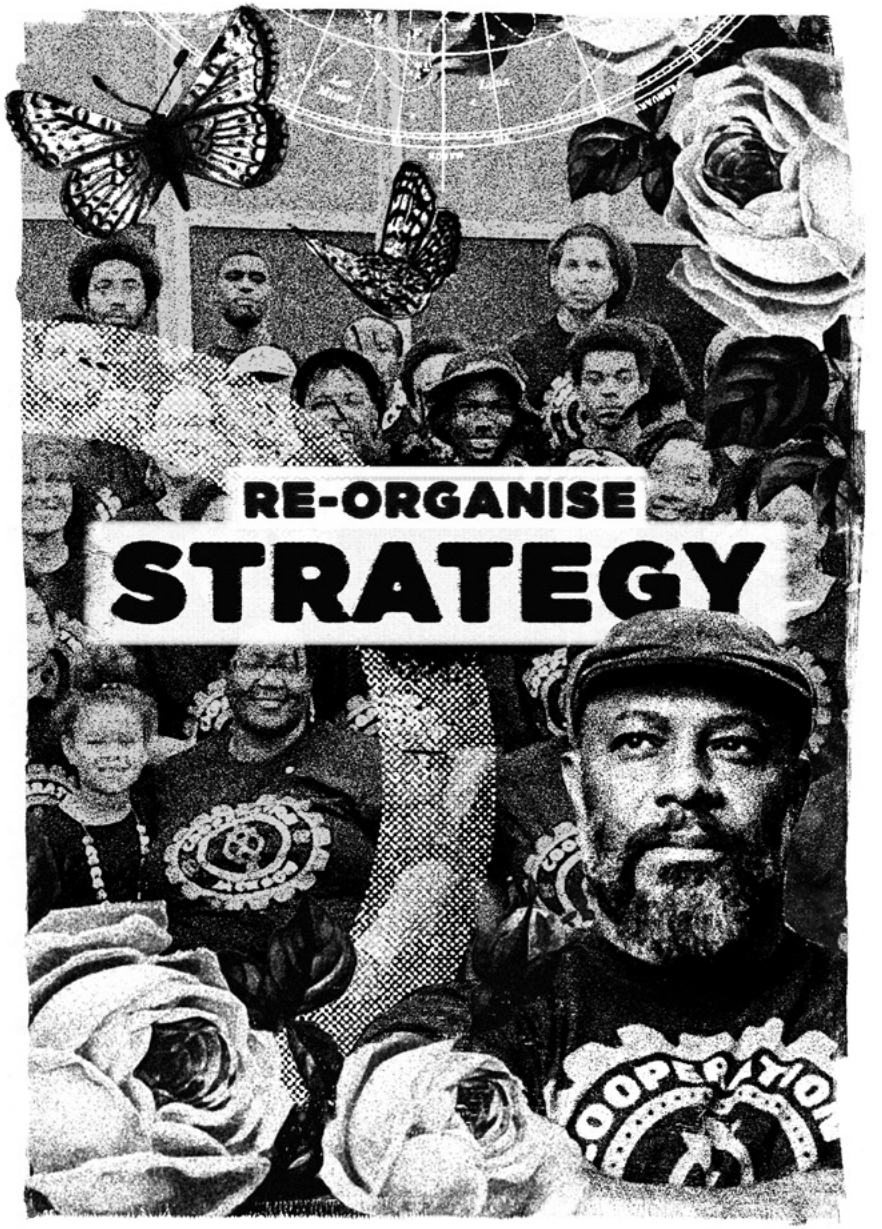
RE-ORGANISE

3 STRATEGY

A GUIDE FOR COOPERATIVES


RE-ORGANISE
STRATEGY

First published in London, 2022 by Dog Section Press
Printed by Calverts Ltd., a worker-owned cooperative

ISSN 2753-5452-03

Published under Creative Commons Attribution-NonCommercial 4.0 International Public Licence

Graphic design and illustration by Matt Bonner – revoltdesign.org
Title page illustration features members of Cooperation Jackson, a network of worker cooperatives in Jackson, Mississippi, United States.

Dog Section Press logo by Want Some Studio

RE-ORGANISE

Re-Organise is a project aimed at promoting alternative ways of organising. Organising differently means critically examining the habits, norms, expectations, and demands of the mainstream ways of doing business and proactively exploring and experimenting with new ones.

Re-Organise is developed by the Loughborough University Cooperative Organisation Development Programme (LUCOOP), which brought together academics and cooperative development bodies to produce this and the other booklets in the series.

This is one small piece of a much larger struggle to help us re-organise not just our organisations, but how we live together as a society.

To get updates from Re-Organise and to join the conversation about how this booklet is being used, sign up to our newsletter at:

re-organise.org

INTRODUCTION

In this booklet, we want to consider some different approaches to strategy in organisations – to examine mainstream strategic advice and consider some ideas for people and organisations doing things differently. We've deliberately not defined what we mean by 'doing things differently' – you might be a cooperative, a social enterprise, or an informal project. If your organisation is democratically controlled and/or has aims beyond simply making a profit, this booklet is for you.

- It is important to recognise that the means we use (tactics) to achieve our chosen ends (goals, priorities, values) are deeply connected. Strategy is how we get to our desired ends via the means we use day-to-day, how we translate our vision into action. This might sound obvious, but in the complexity of running an organisation it can be easy to forget how the means and ends of any plan can influence each other.
- Conventional advice on strategy is not neutral – we can't stress this enough. Increasingly, people think that their business can have positive ends – sustainability, fair working conditions, diversity, etc. – whilst following conventional strategies in many aspects of their organisation. But as strategy is the way means and ends are interlinked, if we want to achieve different ends from mainstream businesses, then we need to consider how our strategies must also be different.

Most modern thinking about strategy has emerged from large, hierarchical, and profit-driven organisations. A lot of it even has its origins in military strategy. As such, it often emphasises individual leaders and their capacity to dictate what everyone else in the organisation has to do. Mainstream strategic thinking about organisation therefore considers *which* decisions are made and by *whom*, but largely ignores questions of *how* they are made.

It also emphasises a particular understanding of efficiency, which sees immediate profit as the only goal to be considered, or as the main goal that comes before anything else. Other 'outcomes' of a strategy – the environmental impact, the well-being of workers, etc. – are ignored as 'side-effects' that do not need to be considered with anywhere near the same concern as profit.

This also introduces assumptions about time. Mainstream strategy tends to emphasise the short-term over the longer-term, and one result of this is that they allow for an extreme flexibility. Flexibility might seem like a good thing, but the type of flexibility we see in mainstream strategic thinking is made possible by putting profit before everything else, often to the point of ignoring it. An obvious example is giving staff zero-hours contracts,

which means they only work when the business wants, or outsourcing jobs to contractors who can be dropped as and when the profit-margins dictate.

The key assumptions in mainstream strategy are:

- The goal is to make money, so performance is measured in financial terms
- Increasing profits is more important than anything else
- Businesses and economies can achieve continuous growth, so there has to be more profit this year than last year
- Economies require large-scale trade
- There are a limited number of customers, and so competition for market share is essential
- Brand and identity are valuable because they can help beat the competition
- Strategies should focus on short-term goals – the next 1-3 years, for example
- Entrepreneurialism – seeking new opportunities to exploit, both in terms of the organisation and the individual – is key
- Hierarchy is the most efficient and effective way of making decisions, especially when it comes to strategic planning
- People are valued and motivated in individualistic ways.

DOING THINGS DIFFERENTLY

In contrast to hierarchical organisations with clear leaders who hold all the power, alternative organisations are often horizontal, democratic, and leaderless (or what is increasingly called leaderful). This means that their strategies need to account for the way decisions are made, placing a strong focus on process, roles, and responsibilities. You can read more about **governance** and **power** in our other booklets.

The goals of your organisation will probably extend beyond the generation of profits. You might be producing socially useful and/or environmentally sustainable products, or generating meaningful, well-paid employment. Having a range of goals is great, but it can complicate strategic thinking, as the best way to secure one goal might impact on another. An important part of strategic development is to consider priorities: are all goals equally important, or are we prepared to focus less on one in order to promote another?

We can see that the desire to have multiple goals, and the need to make our means compatible with our ends,

limits our options in important ways. This extends into the future, and we need to be mindful of the possibilities for change and the outcomes that such change might bring. If our business grows its workforce, for example, we know that, unlike capitalist firms, we can't – and don't want to – simply make those workers redundant at some later date if the business looks like it might shrink. Of course, we never know what's round the corner, but we want to stress that the long-term stability, rather than just the short-term gain, that alternative organisations will tend to promote can result in very different approaches to strategic thinking.

These important differences don't make conventional strategic advice entirely redundant, but it does mean that we need to be careful of when it is and isn't appropriate. It will always be easier to find mainstream help and advice – this is what will almost certainly come up first if you search online, for example – and there is often a cultural legitimacy to this advice too, as it will chime with what you might have picked up about business strategy from the media and in education. Both of these factors can subtly encourage members of alternative organisations to assume they can simply apply mainstream strategy to their own businesses.

There is a lot of evidence that alternative organisations such as cooperatives 'degenerate' (lose sight of their values and principles) as they expand and take on new members whose background is in the conventional business world.

People assume they can do what they used to do and apply what they already know, just in a different setting. Listening to and learning from mainstream businesses isn't always a bad thing, but we need to ask whether the advice and experience we find in mainstream business is really appropriate to our organisation. We need to ensure that we don't simply follow a conventional wisdom that is ill-suited for our unconventional aspirations. Organising as a cooperative goes against a lot of the ideas about business that are taken for granted, and the strategies we use need to be designed with this in mind.

DEVELOPING ALTERNATIVE STRATEGY

When alternative organisations are first established, their members are likely to spend a considerable amount of time thinking strategically; as the daily running of the business takes over, it can be easy to forget the importance of reviewing our strategies. But the world is constantly changing. Sometimes things change slowly, and we can have the impression that we can keep doing things in the same way forever. But that's rarely true and it's usually unwise to approach either business or life like that.

We'd recommend that your organisation commits to holding a detailed strategic review at least once a year, to see how well you are holding onto that link between your overall goals and the actions you are taking every day. But try to make reflection, analysis, and strategic thinking part of your routine – maybe incorporating this as a standard agenda item in your regular meetings.

Strategic planning is only a good idea in practice if people in an organisation are ready for it. One member will not be able to initiate a successful planning process on their own.

You will need to get active support from other members to initiate the process. A certain level of commitment is going to be important. Understanding the need for strategy is key, and people might need to be persuaded of this.

There are plenty of tools and resources to help you move forward when you come to develop or examine your strategy. As we've said, lots of those follow mainstream business thinking. Whatever strategy advice you follow (including this booklet), it's always wise to remember that what works for one organisation might not work for another. Our website can point you to places to get further advice, as well as to some organisations that offer help aimed specifically for people wanting to do things differently.

On the next few pages, we've outlined some steps to get you started.

STEP ONE:
CREATE OR REVIEW YOUR VALUES, VISION, AND MISSION

One of the main reasons for undertaking some strategic thinking and planning is to establish or reaffirm a shared understanding of why your organisation exists and what its aspirations are. Reviewing your organisation's mission, vision, and values statements – or agreeing on and writing these down if you don't have them already – can be a good way to ensure members agree with those goals and

understand them in the same way. Doing this regularly is important in making sure everyone is still in agreement, and that new members know what makes up the foundations of the organisation.

Use your values and principles to create concrete aims and objectives, but ones that question and challenge any common sense or taken for granted ways of doing things. The values and principles you have agreed together can be used to create a vision you want for the organisation in the future, and a vision of the future you want your organisation to be a part of. You can then use these to decide how to respond to the challenges and opportunities you come across and the situations you find yourselves in, both in the long term and on a day-to-day basis.

STEP TWO:
ASSESS YOUR SITUATION

Understanding the different contexts that your organisation operates in is key here. This includes understanding your place in the wider network or ecosystem of organisations similar to yours, as well as the mainstream environment and its challenges. You will also need to understand fully what your internal resources and capacities are.

Systemic perspectives can also be helpful here. These connect interpersonal relations, and small and large groups to the wider organisation and larger social and political

contexts. Some examples of questions from a systemic perspective that might be useful are:

- What are the gaps between your organisation's stated values and what you see happening (the actions you are taking and their results)?
- What creates those gaps? What changes would be necessary to close those gaps?
- What patterns of behaviour do you see that might create some of the difficulties that need addressing?
- What things reinforce these patterns of behaviour? What would you need to change those patterns?
- What ability to change can you identify?
- What role can you and others take to help build capacity for change?

Make sure you include yourself in thinking about these questions.

STEP THREE:
AGREE ON SOME PRIORITIES

Some possible choices will probably have surfaced during the previous two steps. The next step is to tackle those choices, by deciding what to do, and in what order, and by agreeing on what timescales make sense for different priorities. This is where dreams and ambitions meet reality,

and it may not be a straightforward process.

If you have a vision that is very different from the current situation you are in, it might help to take a very long view for some parts of your plan. Working out the small, realistic steps you can take towards achieving a large vision will allow you to act now without losing sight of where you want to end up.

Think about how to include people in this part of the process and go back to your organisation's shared values, mission, and vision to check that there is an alignment.

When making some decisions, it might be useful to understand how different values can compete with one another or produce tensions – value for money vs. environmental sustainability, for example. It will be up to you to work out how you prioritise your values. Getting them out into the open and discussing them are important parts of that process.

STEP FOUR:

PRODUCE A WRITTEN DOCUMENT, PLAN, OR POSTER

When you're working through the various aspects of your organisation at each of the previous steps, write down the specific goals and objectives from the information that has been gathered and the decisions that have been made. You can do this on a big piece of paper, with sticky notes on a

wall, or an online whiteboard if you can't all be in the same room.

Then assign someone to make a list of these and present it in a way that is easier to follow. The points you end up with should be as clear and specific as possible. This is also an opportunity to think about how goals and objectives will be assessed and/or measured, and linked to accountability. The mainstream ways of thinking about strategy put a great deal of emphasis on measurement, and some of this might undermine how you want to organise.

Condensing key points on a poster and putting it up round the organisation can help to keep them in mind and guide the small but important decisions you need to make each day.

STEP FIVE:

TRY YOUR PLANS OUT - IMPLEMENT THE CHANGES

Identify the changes – in skills, in systems, and in structures – that will be needed to bridge the gap between what currently happens and the new ways of doing things that will help you achieve your vision.

SMART

Specific – how clear and unambiguous are your goals?

Measurable – can you measure your progress towards achieving your goals or know when you have succeeded?

Achievable – are your goals achievable with what you have now or will be likely to have in the near future?

Realistic – are your goals within your reach, and are they relevant to you?

Timely – is there a clear timeline, with a start and end, and check-in points along the way?

Change is never easy, so it's really important to think about how people will be supported in any transition and how the organisation can provide the resources people need to feel at home in new ways of doing things.

STEP SIX:
MONITOR, ASSESS AND EVALUATE

The last step is to reflect on the planning process, monitor what happens as a result of it, and evaluate it. What worked

and what didn't? What were the expected and unexpected outcomes? What did you learn along the way? What would you do again in the same way and what would you change?

As you do this, don't forget that internal and external situations will keep changing. The understanding you had of these a year or even six months ago may not match how the situation is today. If you follow these steps, you won't have all the answers to every question that comes up, but you will have something of a roadmap to somewhere you want to go. And just like when you're planning an actual journey, the map is only one half of the story. You still need to keep your eyes on the road and adjust your planned route as you learn more about how the journey is going.

And ask yourself, what would be good enough progress? You might not make it all the way to your end goal, but that doesn't mean you haven't achieved anything.

BROADER STRATEGIES FOR SOCIAL CHANGE: COOPERATION, NOT COMPETITION

Whatever strategies you develop, we want to encourage you to take another step, and think about how what you do can connect to the strategies of others – how together, those strategies might be part of a bigger movement for change.

We suggested earlier that the means and ends that make up our strategies are deeply connected. It's also true that our own means and ends can be connected to the means and ends of other organisations.

Alternative organisations have one potential advantage over mainstream businesses when it comes to strategy – yet too many fail to make good use of it. Fundamental to many alternatives is the idea of mutual-aid and cooperation. Whilst individual organisations need to look out for themselves in certain ways, helping one another is also important, not only for their identity as alternatives, but because this help is directly beneficial. Cooperation between different organisations can make an immediate difference to their daily lives.

But it can also be much more than that.

We want to encourage you to think of yourselves as part of a wider solidarity economy that could grow and develop, with potentially far-reaching consequences. We want to encourage longer term strategic thinking as part of an alternative network or ecology of organisations, which will also be beneficial to you as an individual organisation.

These ways of thinking about strategy aren't separate from one another. Getting your organisation to cooperate with other like-minded organisations and projects can help you and can be part of a broader political for social change – something we definitely can't do alone.

There are countless things you can do to connect your strategies with a wider movement. When you come to do some strategic thinking for yourselves, take some time to ask about this aspect of strategic planning too. Better yet, think about meeting up with other organisations for a day of collaborative planning. Small mainstream businesses know the value of networking and take part in events to build connections. This is all the more important for alternative organisations because cooperation and collaboration are at the heart of our political vision.

Here are some simple steps you can take to help build a solidarity economy:

- Reach out to other local organisations and to ones operating in your sector. You can start by just saying hello! It sounds obvious, but too few of us do it.

- You can then start conversations about developing mechanisms for strengthening relationships.
- You could develop procurement strategies collectively, buying things you both use in bulk (and each other's products/services, if possible). This could be trivial stuff – buying toilet roll together – but it could develop into a powerful buying collective that could cut costs and build a stronger ecosystem of likeminded organisations.

More and more organisations are beginning to develop more explicit connections – but there's a lot of work to be done. Go to our website and you'll find lots of ideas and links to other people and projects that are starting to think about the bigger strategic picture.

We hope this booklet has helped you start thinking about the pitfalls and possibilities we face when we try to organise differently. Whether you're starting off, or an old hand, we want to promote a culture of critical questioning, not just of the capitalist world out there, but of some of our own habits and assumptions.

We've got two other booklets in this series:

- **GOVERNANCE**
- **POWER**

You can get them direct from Dog Section Press or find them along with links to further resources and advice on our website.

dogsection.org
re-organise.org

ISSN 2753-5452

9772753545008 03

£2